

A large, stylized yellow 'W' logo that serves as the background for the main text. The 'W' is composed of several rounded, overlapping shapes, creating a modern and dynamic look.

walker™

walker™

Making change make sense.



Jack Walker is President of Walker, an experience management consulting firm with more than 85 years of expertise helping organizations make change make sense.

Under his leadership, Walker is a Platinum Consulting Partner of Qualtrics, supporting Fortune 1000 teams as they align data, decisions, and experiences to drive meaningful business impact.

Unified XM

→ TURN DATA CHAOS INTO
COORDINATED ACTION

AI is changing how we work. But it also comes with **chaos**. Walker's Unified XM approach challenges leaders to embed **experience data** into their operations. With better integration, XM leaders can make more human-centered, effective decisions—just by **making change make sense**.

01

The
Reality

A state of
movement...

ENTERPRISE CHANGE IS
ACCELERATING, THANKS TO:

→ AI

A state of
movement...

ENTERPRISE CHANGE IS
ACCELERATING, THANKS TO:

→ AI

→ Automation

A state of movement...

ENTERPRISE CHANGE IS
ACCELERATING, THANKS TO:

→ AI

→ Automation

→ Data-driven decisions

...and a state
of **constraint.**

ORGANIZATIONS FACE
CHALLENGES LIKE:

→ Siloed systems

...and a state
of **constraint**.

ORGANIZATIONS FACE
CHALLENGES LIKE:

→ **Siloed systems**

→ **Massive, disconnected
data volumes**

...and a state
of **constraint**.

ORGANIZATIONS FACE
CHALLENGES LIKE:

→ Siloed systems

→ Massive, disconnected
data volumes

→ Multiple owners pulling
in different directions

Data shapes decisions.

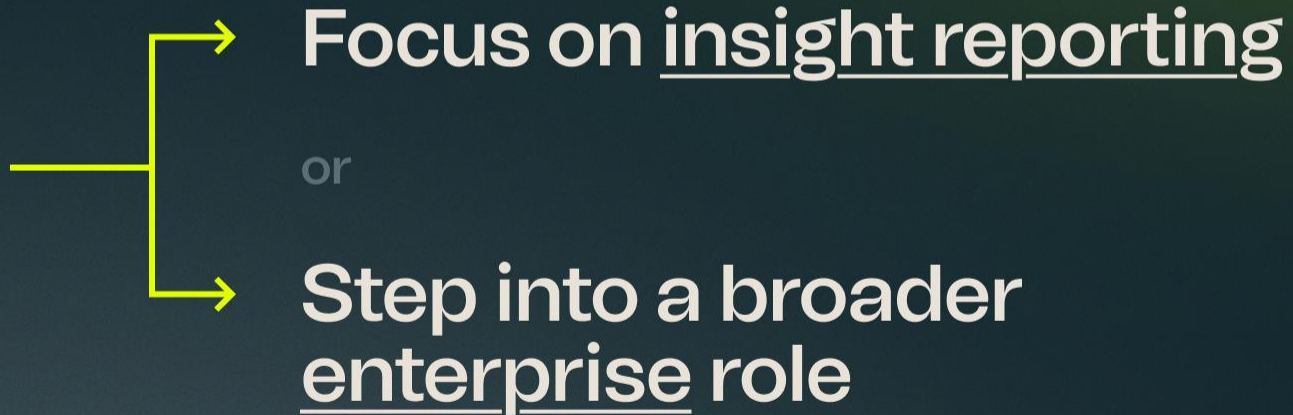


What happens when the
business moves faster than
experience can keep up?

2022

The Risk—
And The
Opportunity

We're at an **inflection point:**



Experience alone isn't
enough to drive **action.**

The risk...

{Enterprise Data}

–

Experience

LEADS TO

{Optimization}

–

Empathy

...and the
opportunity.



Clarity

...and the
opportunity.



Clarity



Direction

...and the
opportunity.



Clarity



Direction



Meaning

03

Unified XM:
A Way of
Working

Unified XM



BEHAVIORAL {B}
DATA

qualtrics^{XM}

EXPERIENCE {X}
DATA



OPERATIONAL {O}
DATA

Turning information into **impact**

WITH UNIFIED XM,
ORGANIZATIONS CAN:

→ Make sense of constant change

Turning information into **impact**

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→ Make sense of constant change

→ Align teams around shared
outcomes

Turning information into **impact**

WITH UNIFIED XM,
ORGANIZATIONS CAN:

→ Make sense of constant change

→ Align teams around shared
outcomes

→ Move from insight to
enterprise action

The hard part

WALKER GUIDES ORGANIZATIONS
THROUGH XM CHALLENGES LIKE:

→ Data and systems alignment

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WALKER GUIDES ORGANIZATIONS
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→ Ownership and governance

The hard part

WALKER GUIDES ORGANIZATIONS
THROUGH XM CHALLENGES LIKE:

→ Data and systems alignment

→ Ownership and governance

→ Organizational coordination

04

PTC: From Insights to Influence



Namrata Wadhwa

is the Senior Director of Customer Experience at PTC, a global leader in product lifecycle management software.

Namrata leads Voice of Customer at PTC, driving how customer insights shape strategy, decisions, and action across the enterprise. She focuses on moving beyond listening to delivering measurable business outcomes from customer feedback.

PTC is a **global software**
company serving industrial and
manufacturing organizations.

PTC AT A GLANCE

Fast Facts

40 Years
of Innovation

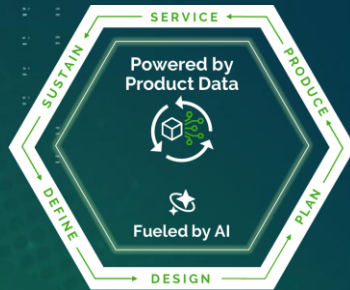
7,000
Employees

\$2.25B
ARR*

~\$20B
Market Cap



Intelligent Product Lifecycle Software



Global Leader

Headquartered in Boston, MA
Operations Across 35+
Countries
Global Partner Ecosystem
~25% to 30% from partners

*2.25B as of the end of Q4'24

POWERING INNOVATION ACROSS INDUSTRIES



Aerospace & Defense



Automotive



Industrial



JOHN DEERE



Electronics & High Tech



NVIDIA



lenovo



Consumer

dyson

Whirlpool

PHILIPS

3M


VOC EVOLUTION



2024

Fragmented

- Inconsistent
- Manual
- Low-confidence signals
- Limited visibility for PTC teams



2025

Unified

- Centralize listening on Qualtrics
- Redesigned NPS baseline
- Win-Loss interviews
- Optimize existing touchpoint listening
- Closed-loop execution



2026

Intelligent

- Expand and scale listening
- Unify structured and unstructured feedback into a **single unified intelligence layer**
- Infuse AI-driven analysis (VoC AI agent) to surface themes, risks, and opportunities at scale

LISTENING MOSAIC ACROSS THE CUSTOMER JOURNEY

Structured
Unstructured
Coming Soon



EXECUTIVE
ENGAGEMENT



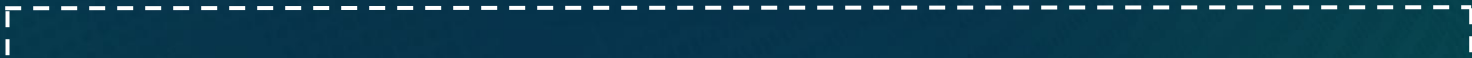
ADVISORY
BOARDS



PRODUCT
SUGGESTIONS



GLOBAL
NPS



DISCOVER

Aware, Consider, Decide

IMPLEMENT

Onboard, Plan, Implement

ADOPT

SUPPORT

Service, Support

GROW

Renew, Upgrade, Churn, Strengthen

Briefing Center Visits
Win/Loss Interviews

Onboarding

Post-Implementation
Product CSATs
Community Intercepts

Omni-channel Support
Support Case Notes

Renewal Journey
Churn & Downgrade

Community Feedback



Who do we listen to: Decision Makers, Buyers, Champions, IT Admins, Procurement Leads, End-Users, GTM PTC Teams

But **PTC** still faced...

↘ Evolving System Landscape

↘ Decision Complexity at Scale

↘ Distributed Data Ownership

↘ Competing Enterprise Priorities

↘ Shared Accountability Across Teams

Resolving the data dilemma

Behavioral, Operational
and Experience is created
and stored in numerous
places.

OPERATIONAL
{O} DATA



ORACLE

Gainsight

CHURNZERO

eloqua



Qlik

HOME GROWN SYSTEMS

BEHAVIORAL
{B} DATA

Gainsight



HOME GROWN WEB
ANALYTICS SYSTEM

EXPERIENCE
{X} DATA

qualtrics^{XM}

05

The
Change

We **start** with
the problem.

PTC

Areas of Exploration

{1} Sentiment & revenue relationship

PTC

Areas of Exploration

{1} Sentiment & revenue relationship

{2} High-consumption, low sentiment risk

PTC

Areas of Exploration

{1} Sentiment & revenue relationship

{2} High-consumption, low sentiment risk

{3} Operational stress signals

PTC

Areas of Exploration

{1} Sentiment & revenue relationship

{2} High-consumption, low sentiment risk

{3} Operational stress signals

{4} Engagement & advocacy gaps

Resolving the data dilemma

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HOME GROWN SYSTEMS

BEHAVIORAL
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Gainsight

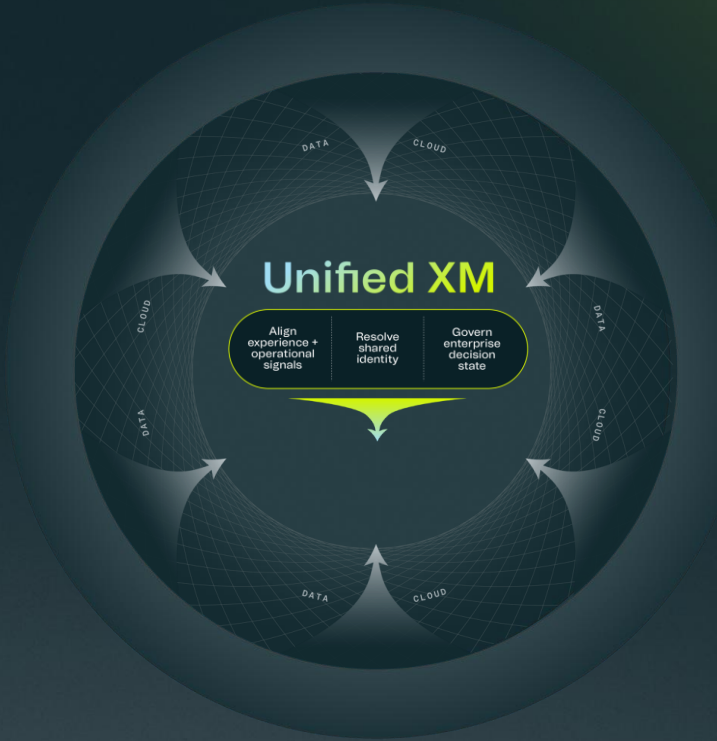


HOME GROWN WEB
ANALYTICS SYSTEM

EXPERIENCE
{X} DATA

qualtrics^{XM}

The **flexibility** of the Data Cloud



OPERATIONAL {O} DATA

salesforce ORACLE

Gainsight

CHURNZERO eloqua

zendesk ptc Qlik

HOMEGROWN SYSTEMS

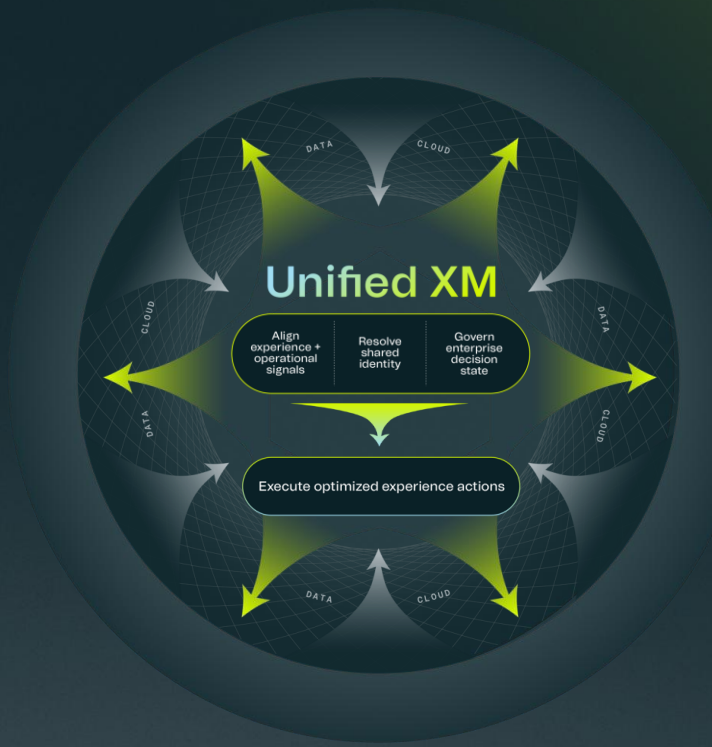
BEHAVIORAL {B} DATA

Gainsight salesforce

ptc HOMEGROWN WEB ANALYTICS SYSTEM

EXPERIENCE {X} DATA

qualtrics.XM



OPERATIONAL {O} DATA

salesforce ORACLE
Gainsight
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zendesk ptc Qlik
HOMEGROWN SYSTEMS

BEHAVIORAL {B} DATA

Gainsight salesforce
ptc HOMEGROWN WEB ANALYTICS SYSTEM

EXPERIENCE {X} DATA

qualtrics^{XM}

Step 1

Gather raw data from siloed systems. Build the initial Data Dictionary.

BEHAVIORAL {B} DATA

- Customer Engagement

OPERATIONAL {O} DATA

- Account data
- Financial data
- Products Purchased
- Support interactions
- Etc.

EXPERIENCE {X} DATA

- Survey response data
- Win/Loss Interviews
- Etc.

account_id	account_name	industry	region	1.2 annual_revenue	account_tier	account_manager	contract_status
A10000	Acme Corp	Finance	Europe	2221078.96	Tier 2	Bob Brown	Pending
A10001	Globex Inc	Retail	Europe	4924538.99	Tier 2	Alice Lee	Active
A10002	Initech Solutions	Healthcare	North America	2600433.02	Tier 2	Alice Lee	Expired
A10003	Umbrella Group	Retail	South America	4369731.83	Tier 2	Jane Doe	Pending
A10004	Stark Industries	Retail	North America	3561383.92	Tier 4	Alice Lee	Expired
A10005	Wayne Enterprises	Technology	North America	2527246.63	Tier 2	Jane Doe	Expired
A10006	Hooli Systems	Healthcare	Asia	559692.33	Tier 1	John Smith	Active
A10007	Vandelay Industries	Healthcare	Asia	4739907.9	Tier 3	Alice Lee	Expired
A10008	Wonka Foods	Healthcare	Asia	3034796.98	Tier 2	John Smith	Active
A10009	Cyberdyne Corp	Retail	Europe	2234374.26	Tier 2	Jane Doe	Expired
A10010	Soylent Corp	Finance	South America	571848.13			
A10011	Tyrell Corporation	Healthcare	South America	1539022.22			
A10012	Gringotts Bank	Retail	South America	1584614.6			
A10013	Oscorp	Technology	South America	3574685.83			
A10014	Pied Piper	Finance	Asia	3244984.96			

account_id	1.2 nps_score	contact_id
A10000	9	C10000A306Z
A10000	2	C10000B653X
A10001	0	C10001A963Z
A10001	3	C10001B866X
A10001	6	C10001C833X
A10001	3	C10001D330X
A10002	2	C10002A259Z
A10002	9	C10002B185Y
A10003	4	C10003A673X
A10003	9	C10003B745Y
A10004	6	C10004A447X
A10004	0	C10004B289X
A10004	8	C10004C476Z

ULTIMATELY BROUGHT IN RAW DATA
FROM 13 UNIQUE SOURCES

* TWO (2) EXAMPLES SHOWN

Step 2

Choose fields—*based on Data Dictionary*—from each data source. Apply rigorous data engineering.

An iterative process of data understanding, validation, cleaning, reformatting + augmentation.

This consolidation work still resulted in **~42,000** rows of Account-level data.

account_id	account_name	industry	region	1.2 annual_revenue	account_tier	1.2 nps_score	account_manager	contract_status
A10000	Acme Corp	Finance	Europe	2221078.96	Tier 2	89	Bob Brown	Pending
A10001	Globex Inc	Retail	Europe	4924538.99	Tier 2	null	Alice Lee	Active
A10002	Initech Solutions	Healthcare	North America	2600433.02	Tier 2	-19	Alice Lee	Expired
A10003	Umbrella Group	Retail	South America	4369731.83	Tier 2	10	Alice Lee	Expired
A10004	Stark Industries						Doe	Pending
A10005	Wayne Enterprises						wn	Active
A10006	Hooli Systems							Expired
A10007	Vandelay Industr							Pending
A10008	Wonka Foods							Expired
A10009	Cyberdyne Corp							Expired
A10010	Soylent Corp							Active
A10011	Tyrell Corporatio						h	Expired
A10012	Gringotts Bank						h	Active
A10013	Oscorp							Expired
A10014	Pied Piper							Pending

Started with 13 raw data files
400+ DATA FIELDS TO PULL INTO ONE SET

25% of these fields were needed
93 TOTAL / 67 CREATED

3 different unique IDs
REQUIRED TO MATCH

Contact-level data aggregated
ROLLED UP TO THE ACCOUNT LEVEL

Step 3

Conduct exploratory data analysis on the 42k rows of data.

Descriptive statistics.

Assess if PTC has enough BOX to conduct our desired analyses.

Early hypothesis testing.

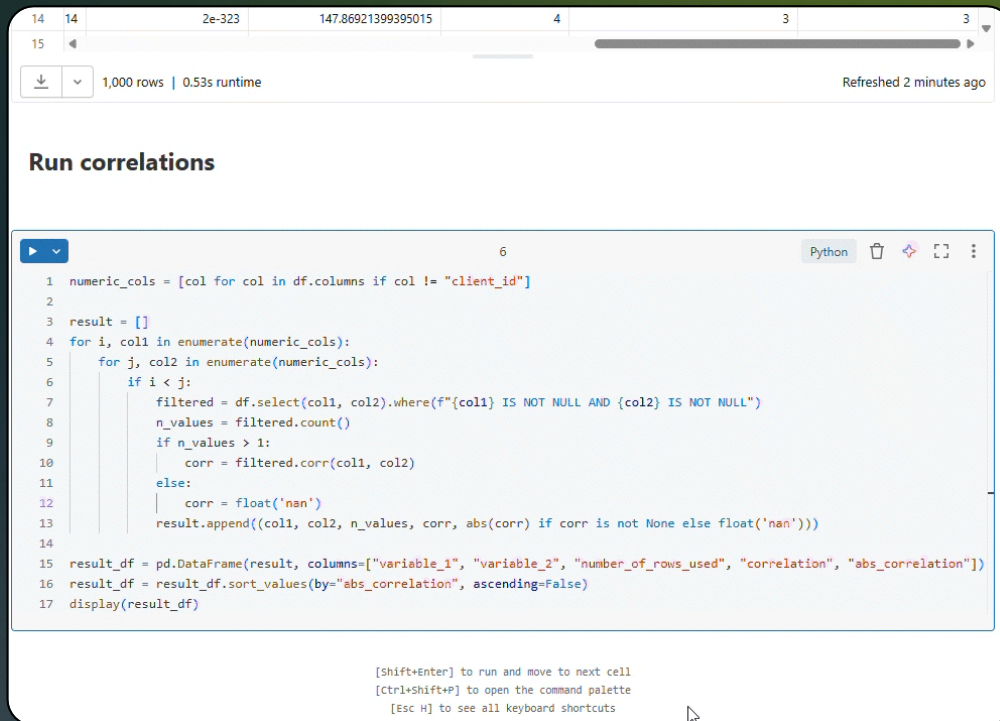
account_id	account_name	industry	region	annual_revenue	num_employees	nps_score	survey_date	account_manager	contract_status
A10000	Acme Corp	Finance	Europe	2221078.96	1071	89	2025-06-24	Jane Doe	Active
A10001	Globex Inc	Retail	Europe	4924538.99	1463	91	2025-06-11	Bob Brown	Pending
A10002	Initech Solutions	Healthcare	North America	2600433.02	615	-19	2025-07-21	Alice Lee	Expired
A10003	Umbrella Group	Retail	South America	4369731.83	1179	10	2025-06-17	Alice Lee	Expired
A10004	Stark Industries	Retail	North America	3561383.92	1845	-48	2025-06-08	John Smith	Pending
A10005	Wayne Enterprises	Technology	North America	2527246.63	1895	-77	2025-07-05	Bob Brown	Expired
A10006	Hooli Systems	Healthcare	Asia	559692.33	1550	53	2025-07-05	Jane Doe	Expired
A10007	Vandelay Industries	Healthcare	Asia	4739907.9	752	87	2025-07-03	Alice Lee	Active
A10008	Wonka Foods	Healthcare	Asia	3034796.98	451	23	2025-07-29	Bob Brown	Expired
A10009	Cyberdyne Corp	Retail	Europe	2234374.26	779	-60	2025-06-05	Bob Brown	Expired
A10010	Soylent Corp	Finance	South America	571848.13	1629	56	2025-07-12	John Smith	Pending
A10011	Tyrell Corporation	Healthcare	South America	1539022.22	211	-86	2025-07-09	Alice Lee	Pending
A10012	Gringotts Bank	Retail	South America	1584614.6	251	-56	2025-07-28	Alice Lee	Active
A10013	Oscorp	Technology	South America	3574685.63	1045	-36	2025-07-11	Jane Doe	Expired
A10014	Pied Piper	Finance	Asia	3244984.96	319	-12	2025-06-28	Alice Lee	Expired

Step 4

Analyze the Data Set.

ONE COMMAND.
779 TESTS.
INSTANT INSIGHT.

Run hundreds of analyses in seconds and immediately see which relationships are worth exploring.



```
14 14 | 2e-323 | 147.86921399395015 | 4 | 3 | 3
15 |
↓ 1,000 rows | 0.53s runtime Refreshed 2 minutes ago

Run correlations

Python

1 numeric_cols = [col for col in df.columns if col != "client_id"]
2
3 result = []
4 for i, col1 in enumerate(numeric_cols):
5     for j, col2 in enumerate(numeric_cols):
6         if i < j:
7             filtered = df.select(col1, col2).where(f"{col1} IS NOT NULL AND {col2} IS NOT NULL")
8             n_values = filtered.count()
9             if n_values > 1:
10                corr = filtered.corr(col1, col2)
11            else:
12                corr = float('nan')
13            result.append((col1, col2, n_values, corr, abs(corr) if corr is not None else float('nan')))
14
15 result_df = pd.DataFrame(result, columns=["variable_1", "variable_2", "number_of_rows_used", "correlation", "abs_correlation"])
16 result_df = result_df.sort_values(by="abs_correlation", ascending=False)
17 display(result_df)

[Shift+Enter] to run and move to next cell
[Ctrl+Shift+P] to open the command palette
[Esc H] to see all keyboard shortcuts
```

* ONE (1) EXAMPLE SHOWN

 databricks

Flexibility of the Data Cloud



No added IT stress

 databricks

Flexibility of the Data Cloud



No added IT stress



Faster movement



Flexibility of the Data Cloud



No added IT stress



Faster movement



Quick results

The perks of **Data Cloud**



What we discovered

Strategic tiers underrepresented

Lack of experience data in some segments

Adjust sampling strategy

Target underrepresented segments

Improve account-level coverage

The **push**
& the **pull** of

Unified XM

Our exploration surfaced opportunities in both directions—enhancing the listening program itself while using operational data to better focus and inform experience initiatives.

{NON-XM}
INITIATIVES

Use Experience data to inform other business initiatives.

{XM}
INITIATIVES

Use **Operation** and **Behavioral** data to inform **Experience** initiatives.

What comes
next?

Clear **experience signals**
beat perfect models—especially
when revenue is at risk.

Learning

Support engagement signals revenue stability.

Among Passive accounts, those not interacting with Technical Support are

4x

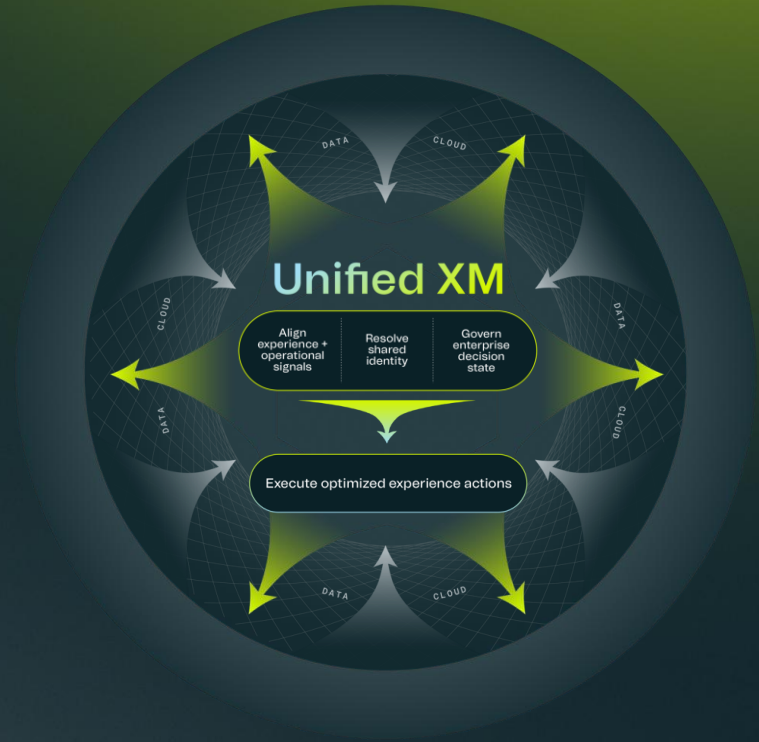
more likely to have declining ARR.

Learning

Support engagement signals revenue stability.

What does executing an optimized experience action look like?

- Good
- Better
- Best



Basic Action

Flag the risk for the account team.

Start by ensuring experience signals show up where revenue risk is managed.

IF

- Passive NPS response

AND

- No Tech Support interaction in the last 90 days

THEN

- Create Gainsight risk alert
- Notify CSM and Account Executive
- Log "Passive + Support Underutilization" as risk reason

Basic Action + Guided Response

Equip the team with a response play.

Help account teams assess and mitigate the risk consistently.

BUILD ON BASIC. ADD:

INTERNAL RESPONSE

- Gainsight triggers CSM Playbook
- Step-by-step mitigation guidance
- Clear ownership and timing

CUSTOMER ENGAGEMENT

- Proactive message highlighting Support value
- Case study demonstrating outcomes
- High-touch outreach for strategic accounts

Automated Engagement

Automatically respond to the signal.

Experience signals trigger engagement without waiting for manual intervention.

WHEN SURVEY RESPONSE IS SUBMITTED:

- IF
- NPS = Passive
- AND
- No Tech Support engagement in last 90 days

THEN AUTOMATICALLY

- Trigger in-product support message
- Provide direct link to support resources
- Encourage early engagement

Intelligent Orchestration

Respond to the signal in the moment.

Experience Agents coordinate the next best action during the feedback interaction.

IN-SURVEY EXPERIENCE:

DYNAMIC FOLLOW-UP

"Customers experiencing similar challenges often benefit from working with our support specialists. Would you like help connecting with an integration expert?"

CUSTOMER OPTIONS

- Schedule support session
- Receive integration guide
- Connect with account team
- Not right now

AGENT THEN

- Books session
- Sends targeted resources
- Alerts account team if needed (indicates not right now)

06

The XM
Leader's
Moment.

Who **shapes** the
coming change?

Unified XM



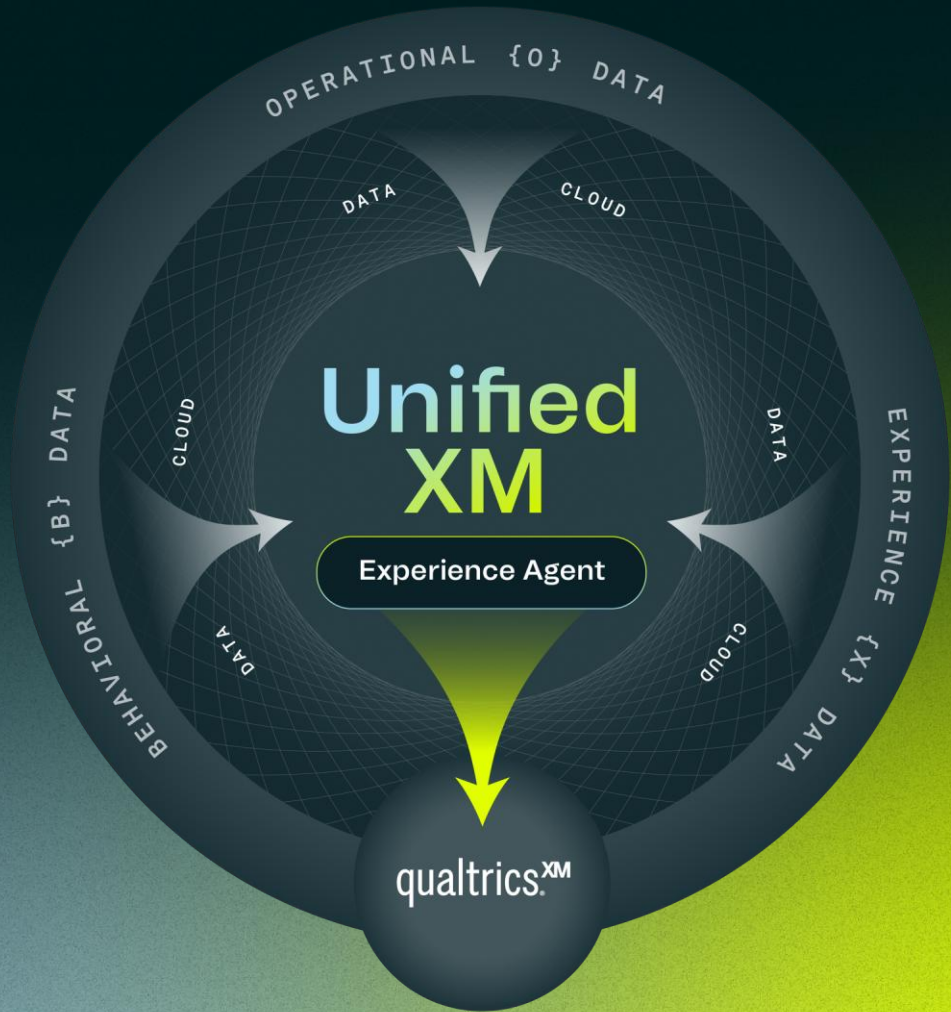
BEHAVIORAL {B}
DATA

qualtrics^{XM}

EXPERIENCE {X}
DATA



OPERATIONAL {O}
DATA



{1} Anchor to a Business Outcome

Start Here: Making Unified XM Real

Start Here: Making Unified XM Real

{1} Anchor to a Business Outcome

{2} Unify What Matters

Start Here: Making Unified XM Real

{1} Anchor to a Business Outcome

{2} Unify What Matters

{3} Test. Learn. Refine.

Start Here: Making Unified XM Real

{1} Anchor to a Business Outcome

{2} Unify What Matters

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{4} Strengthen Your X-Data

Start Here: Making Unified XM Real

{1} Anchor to a Business Outcome

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{5} Prepare for Intelligent Action

Start Here: Making Unified XM Real

{1} Anchor to a Business Outcome

{2} Unify What Matters

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{4} Strengthen Your X-Data

{5} Prepare for Intelligent Action

What role
will **you** play?



Talk to Walker